
RETIREMENT SERVICES

Description: Consists of records relating to the management and operation of retirement planning services. Records include client management and consultation notes.

Filing Guidelines: Records must be securely stored until final disposition.

MUNCLASS Function:	Human Resources (HR)
Responsible Unit(s):	Department of Human Resources
Retention:	Current Year file closed + 5 years
Disposition:	Destroy
Media:	Paper and/or electronic
Authority:	Anticipated Operational Use

Version 01

Approved: August 22, 2018: RS-2018-009
